HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Alberta

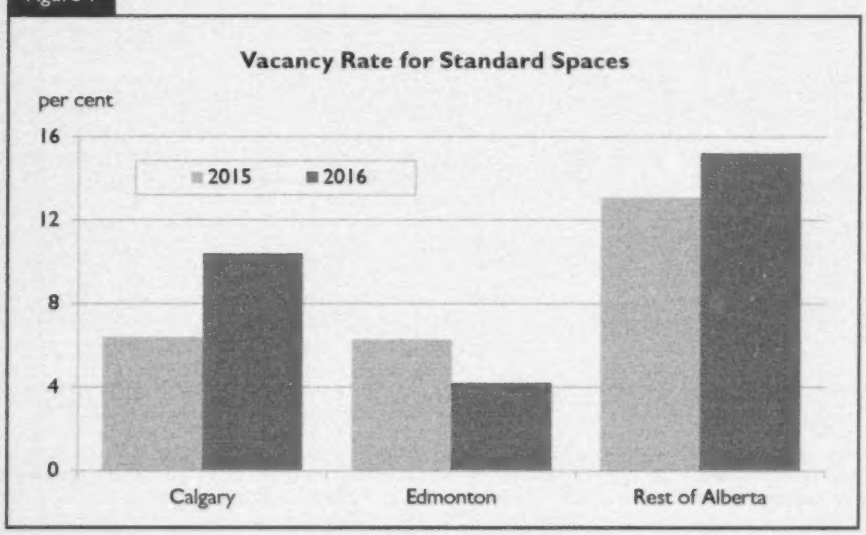
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2016

Highlights

- The overall vacancy rate for a standard space in retirement homes in Alberta increased to 9.2 per cent in 2016, from 8.1 per cent in 2015.
- Overall average rent in Alberta for a standard space increased to $2,992 per month in 2016 from $2,922 in 2015.
- The 2016 survey universe included 12,211 standard and non-standard spaces, in 112 residences.

Figure 1



Source: CMHC

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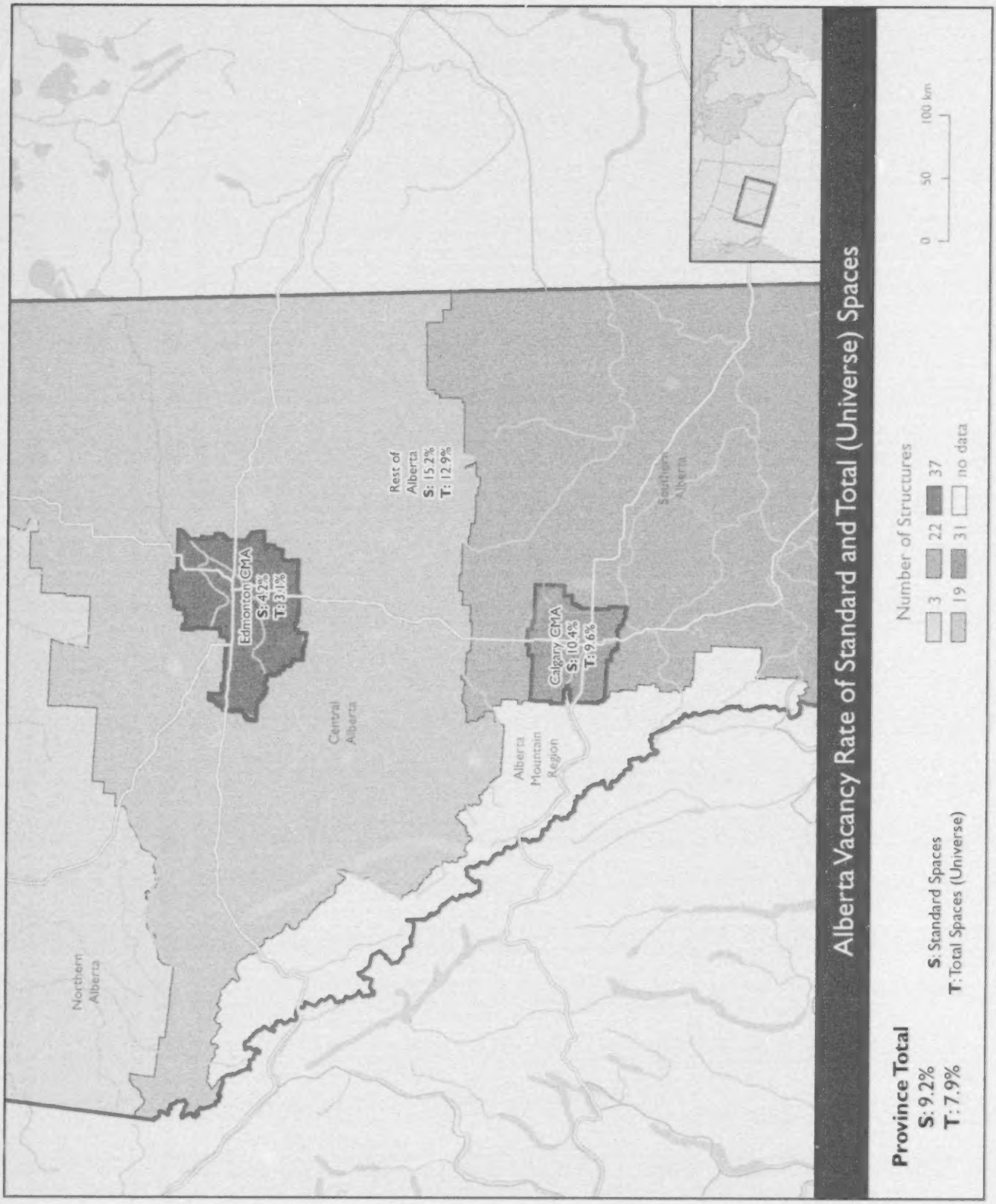

Alberta Vacancy Rate of Standard and Total (Universe) Spaces
Province Total
S: 9.2%
T: 7.9%
S: Standard Spaces
T: Total Spaces (Universe)
Number of Structures
3
22
37
19
31
no data
0
50
100 km
Edmonton CMA
S: 4.2%
T: 3.1%
Calgary CMA
S: 10.4%
T: 9.6%
Rest of Alberta
S: 15.2%
T: 12.9%
Northern Alberta
Central Alberta
Alberta Mountain Region
Southern Alberta

Vacancy Rates

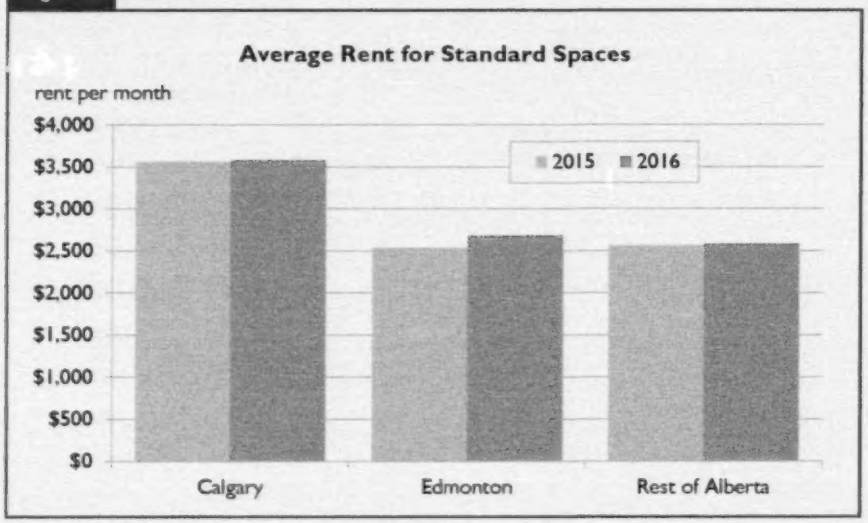
Vacancy rate increases in 2016

According to CMHC's survey of retirement homes in Alberta, the vacancy rate for standard retirement spaces increased from 8.1 per cent in 2015 to 9.2 per cent in 2016. This was led by an increase in vacancies in Calgary and locations outside of Alberta's largest two cities. The vacancy rate in the Calgary Census Metropolitan Area (CMA) increased, moving from 6.4 per cent to 10.4 per cent in 2016. Outside of the province's two largest cities, the vacancy rate grew from 13.1 per cent in 2015 to 15.2 per cent in 2016. The rise in vacancy rates across the province were mitigated slightly by a decline in vacancy rates in Edmonton. In the Edmonton CMA the vacancy rate was 4.2 per cent in 2016, down from 6.3 per cent in 2015.

Once again, bachelor suites had the highest vacancy rate among standard retirement spaces in Alberta, at 12.7 per cent, 2.8 percentage points higher than in 2015. This was also the case for all three sub-markets reported. Bachelor spaces represented the largest increase in the vacancy rate among all suite types in Calgary, increasing 6.7 percentage points between 2015 and 2016. The increase was a result of a rise in the supply of these units.

Suites with two or more bedrooms recorded the lowest vacancy rate among standard spaces at 6.6 per cent, up from 4.5 per cent in 2015. The vacancy rate for a standard space in suites with two or more bedrooms in Edmonton also declined to 1.4 per cent from 3.1 per cent in 2015. In Calgary, the vacancy rate for a standard space in a two-bedroom suite was also the lowest across suite types, despite an increase of 2.6 percentage points from 2015 to 5.5 per cent in 2016.

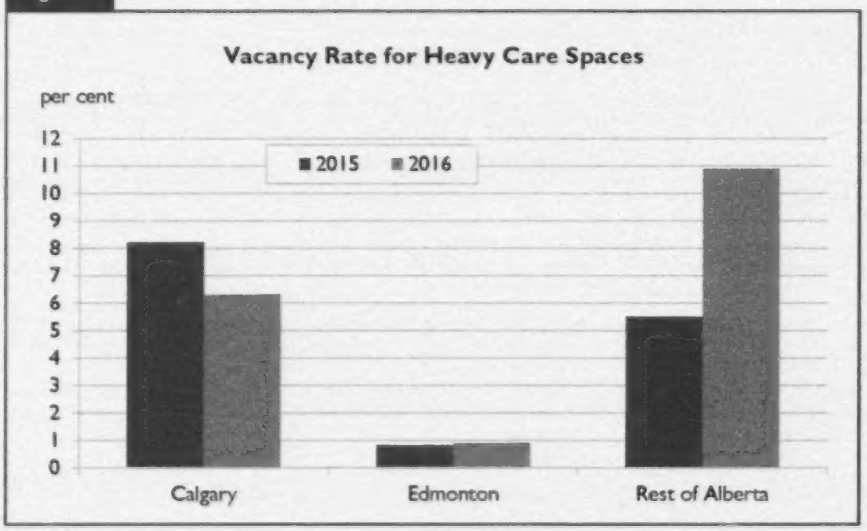
Figure 2



Source: CMHC

In 2016, vacancy rates for standard retirement spaces were lowest for spaces with rent below $1,500, at 4.7 per cent. Spaces with a rent between $1,500 and $1,900 continued to record the highest vacancy rate, but posted the largest decrease in 2016 compared to other rent ranges. This was driven by absorption of these units in Edmonton and the Rest of Alberta. For these spaces the vacancy rate was 15.7 per cent in 2016, down from 19 per cent in 2015. As such, the elevated provincial vacancy rate for spaces renting between $1,500 and $1,900 can be attributed to vacancies in Calgary and the Rest of Alberta. Spaces with the highest rent, at $3,000 or more, had a vacancy rate of 8.0 per cent, greater than the 6.6 per cent vacancy rate one year prior.

Figure 3

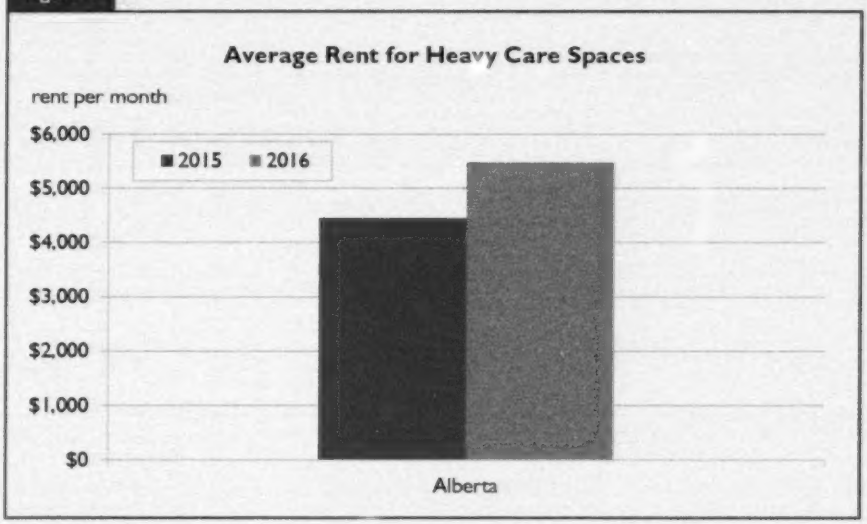


Source: CMHC

Vacancy rate of heavy care spaces continue to rise

Heavy care spaces are classified as spaces in seniors' residences where the residence provides 1.5 hours or more of health care per day to the resident. Vacancy rates in these units continued to rise, to 5.7 per cent in 2016 from 4.2 per cent in 2015. The largest increase in the vacancy rate was outside of Calgary and Edmonton, where the rate moved from 5.5 per cent in 2015 to 10.9 per cent in 2016. Vacancies in heavy care units in Edmonton remained low at 0.9 per cent in 2016, relatively unchanged from 2015. The vacancy rate for heavy care spaces decreased in Calgary, declining 1.9 percentage points from 2015, to 6.3 per cent.

Figure 4



Source: CMHC

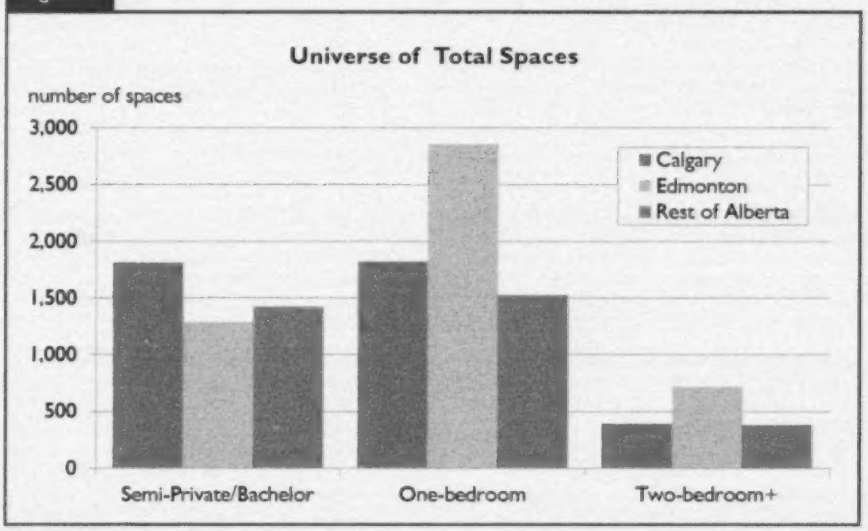
Universe of Retirement Spaces

CMHC's seniors' housing survey included 12,211 retirement spaces, an increase of 9.6 per cent from 2015. The survey included 112 residences and counted 12,261 seniors living in these residences. Although the number of spaces increased at a faster pace than the population of seniors aged 75 and over, the capture rate[1] for the survey rose to 5.8 per cent, up from 5.5 per cent in 2015. A larger proportion of Alberta's seniors chose to live in a retirement home in 2016.

Almost half of all retirement home spaces in Alberta were in one bedroom units. Semi-private spaces and bachelor units were the second most common, at 37 per cent of all units. Spaces in two-bedroom units accounted for the remaining 12 per cent.

Nearly 40 per cent of all retirement spaces in Alberta were in Edmonton, another 33 per cent were in Calgary, and the remaining 28 per cent were elsewhere in the province. Although the rest of Alberta has more retirement buildings than Edmonton and Calgary, the buildings in these two cities can house more seniors'. The average building in Calgary and Edmonton can accommodate 129 and 131 residents per building, respectively, while the average building elsewhere in the

Figure 5



Source: CMHC

[1] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

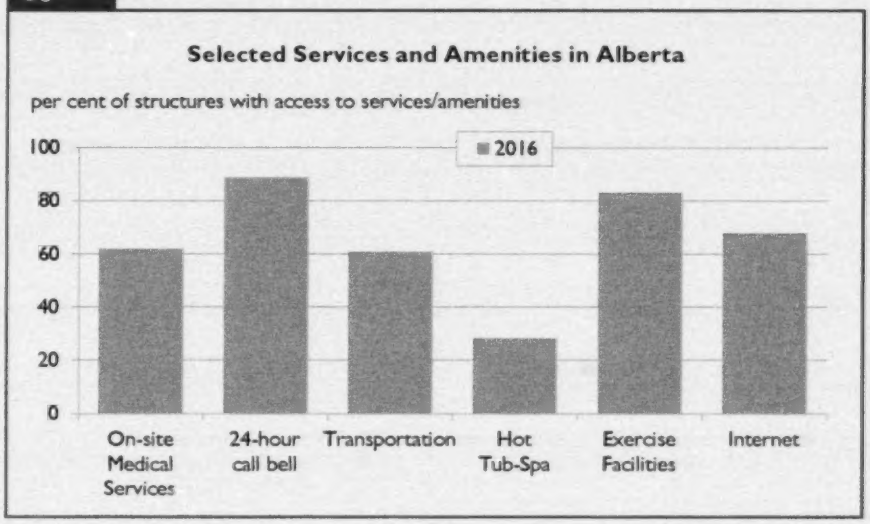
province houses 75 residents. All three areas saw the number of retirement spaces increase from 2015 to 2016, with Calgary posting the biggest gain with a 10.4 per cent increase in the number of spaces between 2015 and 2016.

Services and Amenities

Seniors' residences provide some services and amenities that are not typically present in purpose-built rental buildings. Such services may include housekeeping, meal plans, medical services, and various recreational programs. To be included in the survey, a facility must offer an on-site meal plan. Over 64 per cent of structures surveyed in Alberta had three meals included in the rent. As was the case in the 2015 survey, the most common amenities in Alberta structures were a 24-hour call bell service and an exercise facility. Call bells were found in 88.9 per cent of structures and exercise facilities were in 83 per cent of structures.

Structures in Calgary provided a higher proportion of the services and amenities tracked in the survey compared to Edmonton and the Rest of Alberta. For example, internet access and/or transportation services were provided in 85 per cent of structures surveyed in Calgary. For the Rest of Alberta excluding Edmonton, the proportion of structures with internet access was 60 per cent and transportation service was provided in 44 per cent of structures surveyed.

Figure 6



Source: CMHC

Rents

Average rent for all spaces in Alberta continue to increase

Average monthly rent for a standard space of any type in Alberta was $2,992 in 2016, $70 more per month than a year earlier. Rent in seniors residences are higher than those in the purpose-built rental market due to additional amenities and services provided in seniors' residences. Suites of all bedroom type categories saw increased average rent at the provincial level. Spaces with two-bedrooms or more reported an average rent of $3,709 in 2016, up $167 per month from 2015. The average rent for bachelor and one-bedroom suites also increased from the previous year, albeit to a lesser degree. From 2015 to 2016, the average rent for bachelor suites rose $12 a month to $2,417, while one-bedroom suites increased $82 a month to $3,042.

Standard spaces in Calgary had the highest average rent in the province, much higher than rents reported in Edmonton and the Rest of Alberta. Calgary had an overall average rent of $3,583 in 2016 while rents in Edmonton and the Rest of Alberta were more comparable, averaging $2,680 and $2,581, respectively. Suites with two or more bedrooms in Calgary and Edmonton both recorded an increase in the average rent from 2015 to 2016. Meanwhile, the average rent for suites with two or more bedrooms in the Rest of Alberta declined by $47 a month, to $3,287 in 2016, from last year due an increase of the proportion of spaces that have rents less than $2,000 a month. Average rent for bachelor and one-bedroom suites in 2016 reported a year-over-year increase in all three regions.

Nearly 70 per cent of standard spaces in Calgary had an average rent of $3,000 or more. However, standard spaces with rents of $3,000 or more comprised just over a third of standard spaces in Edmonton and less than a quarter of the total standard spaces in the Rest of Alberta. Only seven per cent of standard spaces in Alberta had rents for less than $1,500 per month. These suites were mainly in Edmonton, with some in the Rest of Alberta. In Calgary, however, only four per cent of standard spaces rented below $2,000 per month. Nearly 22 per cent of the standard spaces in Edmonton and 25 per cent of standard spaces in the rest of Alberta had an average rent below $2,000 a month. Spaces with monthly rent between $2,000 and

$2,500 represented 18 per cent of spaces in the province, and 21 and 25 per cent of spaces in Edmonton and the Rest of Alberta, respectively, fall into this price range. On the other hand, only 13 per cent of the market in Calgary is made up of spaces in this price range.

Average Rent for Heavy Care Spaces

Heavy care spaces in Alberta had an average rent of $5,478 in 2016, up from $4,450 in 2015. Rents for heavy care spaces generally command higher rents compared to standard spaces as more health care services are included in the rent.

TABLES INCLUDED IN THE ALBERTA SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Calgary CMA	**	**	6.5	13.2	7.1	9.7	2.9	5.5	6.4	10.4
Edmonton CMA	**	**	12.9	8.6	5.4	3.6	3.1	1.4	6.3	4.2
Rest of Alberta	**	**	13.2	17.2	14.1	14.3	9.0	16.2	13.1	15.2
Alberta	**	**	**9.9**	**12.7**	**8.4**	**8.4**	**4.5**	**6.6**	**8.1**	**9.2**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $1,500		$1,500 - $1999		$2,000 - $2,499		$2,500 - $2,999		$3,000 and more		Total where rents are known	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Calgary CMA	**	**	**	20.0	5.9	13.7	5.1	10.5	6.8	8.9	6.4	10.2
Edmonton CMA	3.9	**	6.1	2.9	12.2	5.3	4.3	2.9	5.1	4.8	6.3	4.2
Rest of Alberta	8.1	**	24.5	19.1	10.9	13.2	12.5	15.0	7.9	12.8	13.1	15.2
Alberta	**4.3**	**4.7**	**19.0**	**15.7**	**10.3**	**10.0**	**6.6**	**9.4**	**6.6**	**8.0**	**8.1**	**9.1**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Alberta

Centre	Vacancy Rate		Average Rent	
	2015	2016	2015	2016
Calgary CMA	8.2	6.3	5,220	**
Edmonton CMA	0.8	0.9	3,709	**
Rest of Alberta	5.5	10.9	**	**
Alberta	**4.2**	**5.7**	**4,450**	**5,478**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Alberta

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2015	2016				
Calgary CMA	4,023	6.3	9.6	31	3,999		
Edmonton CMA	4,859	4.3	3.1	37	5,129		
Rest of Alberta	3,329	10.5	12.9	44	3,133		
Alberta	**12,211**	**6.6**	**7.9**	**112**	**12,261**	**213,200**	**5.8**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type
Alberta

Centre	Semi Private/ Bachelor	One Bedroom	Two Bedroom +	Total
Calgary CMA	1,809	1,822	392	4,023
Edmonton CMA	1,289	2,852	718	4,859
Rest of Alberta	1,422	1,525	382	3,329
Total Alberta	**4,520**	**6,199**	**1,492**	**12,211**

2.2 Universe by Unit Type
Alberta

Centre	Semi Private/ Bachelor	One Bedroom	Two Bedroom or more	Total
Calgary CMA	**1,809**	**1,822**	**392**	**4,023**
Standard Spaces	978	1,511	345	2,834
Non-Standard Spaces	583	117	7	707
Unknown Spaces	248	194	40	482
Edmonton CMA	**1,289**	**2,852**	**718**	**4,859**
Standard Spaces	500	1,638	484	2,622
Non-Standard Spaces	620	597	69	1,286
Unknown Spaces	169	617	165	951
Rest of Alberta	**1,422**	**1,525**	**382**	**3,329**
Standard Spaces	420	1,245	354	2,019
Non-Standard Spaces	977	202	12	1,191
Unknown Spaces	25	78	16	119
Alberta	**4,520**	**6,199**	**1,492**	**12,211**
Standard Spaces	1,898	4,394	1,183	7,475
Non-Standard Spaces	2,180	916	88	3,184
Unknown Spaces	442	889	221	1,552

2.3 Universe of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 - $2,999	$3,000 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Calgary CMA	0.2	3.7	12.7	16.0	67.4
Edmonton CMA	16.4	5.3	20.9	18.2	39.1
Rest of Alberta	2.0	22.9	24.9	27.8	22.3
Alberta	**6.8**	**9.1**	**18.8**	**19.8**	**45.5**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Alberta

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Calgary CMA	0.0	**	**	77.8	**	**	88.9	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	**	**	78.3	**	**	91.3	**
Edmonton CMA	**	**	**	**	**	**	86.7	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	83.3	**
Rest of Alberta	0.0	18.8	9.7	71.6	64.8	51.1	90.9	4.5
10 - 49	**	19.5	**	**	**	**	70.7	9.8
50 - 89	0.0	20.8	10.4	68.8	79.2	58.4	100.0	5.2
90 or more	**	**	**	84.5	55.2	**	93.1	**
Alberta	**2.2**	**21.5**	**12.4**	**64.0**	**61.8**	**52.1**	**88.9**	**11.3**
10 - 49	0.0	**	**	**	**	**	70.1	7.2
50 - 89	0.0	27.9	11.4	60.7	76.9	53.5	100.0	**
90 or more	3.5	**	12.0	65.9	57.1	54.4	88.3	13.5

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Alberta

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Calgary CMA	85.2	**	**	**	92.6	85.2
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	91.3	**	**	**	100.0	95.7
Edmonton CMA	**	**	**	**	76.7	**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	79.2	**
Rest of Alberta	44.3	2.3	21.0	39.8	81.8	59.1
10 - 49	29.3	**	**	9.8	**	80.5
50 - 89	36.4	0.0	15.6	48.1	94.8	37.7
90 or more	65.5	6.9	**	**	93.1	72.4
Alberta	**60.8**	**7.2**	**28.3**	**45.2**	**83.1**	**67.7**
10 - 49	21.6	0.0	0.0	7.2	**	**
50 - 89	**	0.0	10.9	**	87.8	**
90 or more	77.4	11.4	**	54.0	89.8	80.5

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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3.1 Average Rent ($) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Calgary CMA	**	**	2,860	2,767	3,754	3,839	4,522	4,716	3,564	3,583
Edmonton CMA	**	**	1,974	2,081	2,515	2,676	3,092	3,308	2,538	2,680
Rest of Alberta	**	**	1,990	2,024	2,562	2,569	3,334	3,287	2,564	2,581
Alberta	**	**	**2,405**	**2,417**	**2,960**	**3,042**	**3,542**	**3,709**	**2,922**	**2,992**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)
Alberta

Centre	Concrete Frame	Wood Frame
Calgary CMA	33.3	66.7
Edmonton CMA	56.8	43.2
Rest of Alberta	20.5	79.5
Alberta	**36.0**	**64.0**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Alberta

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Calgary CMA	Cable	48.4	29.0	22.6	45.60
	Telephone	19.4	61.3	16.1	**
Edmonton CMA	Cable	56.8	32.4	8.1	**
	Telephone	2.7	73.0	13.5	**
Rest of Alberta	Cable	43.2	29.5	25.0	42.22
	Telephone	15.9	54.5	20.5	30.71
Alberta	**Cable**	**49.1**	**30.4**	**18.8**	**44.18**
	Telephone	**12.5**	**62.5**	**17.0**	**32.47**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Alberta

Centre	Before 1990	1990 - 1999	2000 or later	Total
Calgary CMA	**	12.7	9.9	10.4
Edmonton CMA	3.4	9.8	3.3	4.2
Rest of Alberta	**	16.3	15.0	15.2
Alberta	**5.3**	**12.6**	**9.3**	**9.2**

The following letter codes are used to indicate the reliability of the estimates:
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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Alberta

Centre		Before 1990	1990 - 1999	2000 or later	Total
Calgary CMA	Semi Private	**	**	**	**
	Bachelor	**	2,776	2,724	2,767
	One Bedroom	**	3,881	3,782	3,839
	Two Bedroom +	**	**	4,552	4,716
	All	**	3,427	3,626	3,583
Edmonton CMA	Semi Private	**	**	**	**
	Bachelor	1,825	**	2,210	2,081
	One Bedroom	1,749	2,898	3,074	2,676
	Two Bedroom +	**	**	3,441	3,308
	All	1,787	2,881	3,060	2,680
Rest of Alberta	Semi Private	**	**	**	**
	Bachelor	**	2,223	1,927	2,024
	One Bedroom	**	**	2,519	2,569
	Two Bedroom +	**	**	3,257	3,287
	All	**	2,673	2,566	2,581
Alberta	**Semi Private**	**	**	**	**
	Bachelor	**2,282**	**2,584**	**2,396**	**2,417**
	One Bedroom	**2,234**	**3,301**	**3,150**	**3,042**
	Two Bedroom +	**3,311**	**4,240**	**3,689**	**3,709**
	All	**2,325**	**3,086**	**3,117**	**2,992**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Surv , is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e mail responses. Information was obtained from the residence owner, manager or administrator. Survey . esults reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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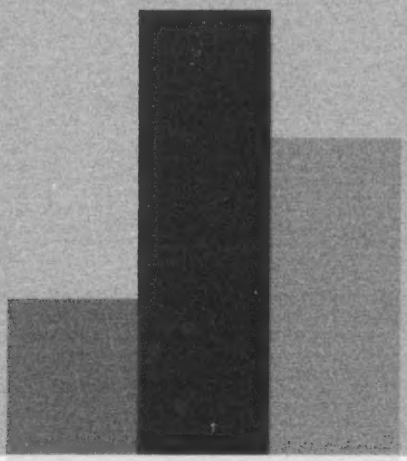

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